



**Seniors on a Mission  
Strategic Planning and Implementation Process  
Fifth Draft**

**Submitted**

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**Prepared by  
Dr. Eric A. Becher, President  
Vavarde, LLC**



*Sustain your future*

## Introduction

*“She’s an unrelenting dispenser of God’s grace and encouragement - she just loves seniors!”* This is how one of her seniors described the work of Joanne Hickox, Founder and Executive Director of “Seniors on a Mission”, a Florida based nonprofit dedicated to improving the lives of seniors while serving other nonprofit organizations.

Joanne, a Canadian farm girl, graduated from Humber College with a film degree, and served as a feature film accountant for 15 years. She was then the President and CEO of multiple retail stores in Florida, before becoming the Finance Director of a multi-million non-profit organization, Project S.O.S. Joanne found her true calling in 2002 when created her unique *“Seniors on a Mission”* outreach program for independent-living seniors in Northeast Florida. Seniors on a Mission has received enthusiastic and critical acclaim from every corner of the country and Joanne has been honored with many awards from very diverse groups. She is known within the non-profit community and beyond as someone who creates unique and innovative win-win-win programs, with humility and humor that speaks directly to the hearts and minds of seniors everywhere.

The accolades started when the Mayor of the City of Jacksonville’s Faith Based Initiative awarded Joanne a special grant to double the size of her program. Through her efforts the Salvation Army recognized Seniors on a Mission three times as their Volunteer Group of The Year, followed by receiving a prestigious Robert Wood Johnson Foundation award. This \$400,000 matching grant award helped secure the infrastructure of her organization. Shortly after that, the State of Florida’s Council on Aging chose Joanne Hickox as the Volunteer of the Year for the Quality Senior Living Award, that was followed by Super Bowl coach and best-selling author, Tony Dungy awarding Joanne The Uncommon Hero Award.

WTLV-TV, the local Jacksonville NBC television affiliate, recognized her as one of the “Twelve Who Care.” Florida’s most widely circulated newspaper, The Florida Times Union recognized Joanne as one of four women nominated for the “Eve Award” for their extraordinary efforts and accomplishments in volunteer service. The Bank of America acknowledged her as a Local Hero, and nationally, the Home Depot has awarded her the “National Hometown Hero Award” during their national telecast of the American Country Music Awards. Joanne received the Daily Points of Light Award from President George H.W. Bush honoring Joanne Hickox and Seniors on a Mission in 2011 with this national award for creating meaningful change in communities across America. Seniors on a Mission has been honored by receiving the Marco Difference Makers Award, the Jewish Community Hero Award, and the HandsOn Faith Award from HandsOn Jacksonville. In 2015, Seniors on a Mission received the Melody Starr Anne Bishop Community Involvement Award given by the 2015 President of the City Council, Clay Yarborough.

Joanne is an ordained minister and a published author of the series GodTimer. She takes no credit for her success, she sums it up this way, “God will use us all if we’ll let Him – my only job is to be obedient and stay out of the way while enjoying the adventure. So far, my adventure with Seniors on a Mission has been an incredible ride. And regarding all the accolades... the sweetest reward is the tender hug of a grateful senior.”

## Seniors on a Mission Sustainability for the Future

A primary goal for Seniors on a Mission is to create a sustainable budget model so their work will continue on for future generations of seniors and the nonprofits they serve. This plan outlines the work to be done over the next several years to accomplish that goal along with other goals aligned with the Mission, Vision, and Guiding Principles of Seniors on a Mission.

## **Why Strategic Planning and Implementation Processes**

Many nonprofits move from year to year without a defined plan of action often relying on hard work of their staff and the good will of their boards to solve operational and financial issues to keep their activities afloat. Their success ebbs and flows based on the number of consumers or clients and the generosity of a handful of donors. Budgets are determined on a yearly basis relying on recent history and a short-term view of the future. New initiatives and major growth ideas are imagined and discussed, and then promptly shelved because the needs of the current year overwhelm the staff and Board. Organizations seeking to strengthen their operations and launch new initiatives look to strategic planning exercises to create an effective pathway to the future. Traditional strategic planning processes included the usual fare – SWOT analysis, constituent buy in meetings, prioritization exercises, and so on. Teams of planners would spend countless hours pulling together information gleaned from focus groups and outline the priority lists for strategic initiatives. Despite this type of effort, without an accompanying comprehensive implementation process, strategic plans often become a dusty and neglected demise on the shelves of the nonprofit.

## **Why Nonprofits Struggle**

With over 1.3 million nonprofits in the United States today, the competition for fundraising dollars has never been greater. Nonprofits often struggle from a number of factors. These factors by themselves, or often when not coordinated with other areas within the nonprofit, make success and certainly long-term sustainability an issue. Without a comprehensive plan and strategy to implement that plan, staff and Board members become disenchanted and unmotivated. The following is a list of areas that contribute to the downfall of many nonprofits.

### *Strategic Planning*

Many nonprofits do not have a comprehensive marketing and communication plan. Nonprofits often have a poor website and other social media that are not kept up to date and do not drive consumers to regularly return for new information. Their lack of a public relations plan that gets the nonprofit noticed in the community and illuminates what they purport to do will inhibit their progress. Additionally, a lack of comprehensive brand strategy that drives familiarity and awareness in the community; and materials that are not up to date, poorly written, or have design flaws that do not enhance the organizational brand – all of these factors will serve them poorly.

### *Finances*

When nonprofits lack the resources to have qualified financial staff, many organizations are forced to rely on Board expertise to guide them in areas of financial concern. This can be problematic when there is a lack of Board or volunteer expertise, time, or when Board members suffer from burnout and may eventually leave the organization. Lack of attention to financial matters may also contribute to losing the nonprofit's tax-exempt status limiting their ability to cultivate donors, apply to private foundations, or seek funding from government granting agencies.

### *Board Governance, Legal Issues, and Effective By-Laws*

Without a carefully defined set up of by-laws, policies, and procedures many nonprofits struggle during transitional times or times where staff or board leadership falters. Having these areas clearly articulated with an eye for legal considerations can not only save time and money in the long run, it can also serve to focus the organization on the more important issues such as work related to the mission and vision.

### *Budgeting*

Relatively few nonprofits do long-term budget planning and sustainability studies. Many do not have the expertise or the discipline to do this type of planning that anticipates future expenses; accurately predicts

revenue streams from operations and from fundraising efforts, allows (financially) for the new initiatives associated with their strategic plan; nor do they focus on long term organizational sustainability.

#### *Gauging the Ripple Effect*

Organizations often take on new initiatives without considering the ramifications across the organization of new work responsibilities, staffing requirements, or the need for new resources to support the new initiatives. Adding new initiatives without considering the current prioritization of work done by existing staff can cause ineffective implementation of the initiatives and a disconnected and frustrated nonprofit team.

#### *Information Technology*

Most nonprofits cannot afford full time or part time IT help. This assistance is critical when incorporating technology into the core work of the organization; maintenance of current technology and planning for future upgrades; and database management. Having a database that is up to date is critical for nonprofits if they hope to communicate with prospective patrons and donors; help them remember to follow through with donor cultivation processes; perform periodic wealth screenings to uncover wealth and areas of interest; and perform ongoing stewardship to those who have already given.

#### *Marketing and Communication*

Many nonprofits do not have a comprehensive marketing and communication plan. Nonprofits often have a poor website and other social media that are not kept up to date and do not drive consumers to regularly return for new information. Their lack of a public relations plan that gets the nonprofit noticed in the community and illuminates what they purport to do or a lack of comprehensive brand strategy that drives familiarity and awareness in the community; and materials that are not up to date, poorly written, or have design flaws that do not enhance the organizational brand will serve them poorly.

#### *Developing Meaningful Relationships*

Without a large audience with which to communicate, marketing plans can be ineffective due to a lack of exposure. To be successful in the long-term, nonprofits must develop relationships that steward existing relationships and nurture future partners. Failing to plan for and cultivate constituents, engage ongoing community partners, and cultivate philanthropic supporters will inhibit the nonprofit's future sustainability.

#### *Securing Resources*

Nonprofits need to develop a comprehensive cultivation strategy that raises funds for the present and sets the table for the future. A coordinated blend of annual fund work, major gift cultivation, and planned giving efforts will enable the nonprofit to implement a sustainable future. Nonprofits who neglect donors across the entire life continuum may have short term fundraising results and in some cases, not be able to complete a major fundraising campaign. Without a comprehensive fundraising strategy, they will not have a sustainable model that ensures future generations of givers and successful campaigns to ensure the long-term sustainability of the organization.

#### *Stewardship and Donor Recognition*

Most successful fundraising organizations base their success on robust stewardship programs that recognize donors, sponsors, and volunteers in meaningful ways. A purposefully and sincerely crafted stewardship program can elevate current donors to increased giving levels and motivate prospective donors and sponsors to consider making a gift. For volunteer development, it is the only way to encourage loyalty and consistency year after year.

#### *Creating an effective Implementation Timeline*

Implementation of a sustainable future for any nonprofit normally includes incremental steps that are laid out in sequential order that the Board, staff, and supporters of the organization can understand and rally

around. These steps take the organization through dramatic growth while recognizing budgetary factors along the path to sustainability.

### **Moving Seniors on a Mission into a Sustainable Future**

The following information represents a document that becomes a living and changing document with a list of goals and objectives representing the future work of Seniors on a Mission. These elements may change according to changes in state and federal law; future partners; operational and fundraising progress; and other factors that may accelerate certain aspects of the plan and slow down other areas. It will be prudent for the organization to review the strategic plan regularly and make changes accordingly as each fiscal year draws to a close. Keeping a discipline of having a three-year outlook for planning, implementation, budgeting etc., will be a healthy exercise to keep the plan relevant and achievable.

The elements of the Strategic Plan are

- Mission Statement (who we are)
- Vision Statement (what we want to become/do)
- Guiding Principles (what we value)
- The Strategic Plan (includes goals, objectives, tactics, metrics, potential obstacles to anticipate, timeframe to complete the work, and project lead)
- The Implementation Plan (includes how we will tell the story, develop meaningful relationships, and secure operational and philanthropic resources)
- Milestones (major goal completion or target dates)
- Yearly Timeline (outline of yearly work functions that will create long-term sustainability)

#### **Mission Statement (who we are)**

*Engaging Senior Adults, Serving God & Community*

#### **Vision Statement (what we want to become/do)**

*We envision a world where seniors are valued, honored, and encouraged to live invigorated lives filled with purpose and grace.*

#### **Guiding Principles (what we value)**

These are the primary tenets by which Seniors on a Mission works on behalf of the people they serve. These tenets guide the everyday work of the Seniors on a Mission staff, Board, and volunteers illuminating these tenets to the external environment.

Excellence in our Work

*We seek to do everything with excellence.*

Advocacy for Seniors

*We seek to honor and benefit seniors through the work we do together.*

Faith and Care for our Seniors

*Next to Jesus, seniors are #1 on weekdays.*

#### Senior Housing

*We seek to be a pioneer in the latest trend in senior housing.*

#### Safeguard Our Seniors and Friends

*We seek to safeguard all information about our seniors and benefactors to the organization.*

#### Nonprofit Status

*We seek to remain a private, nonprofit 501(c)(3) corporation that follows all applicable laws and protects our donors.*

#### Donor Stewardship

*We are committed to protecting and recognizing our donors who give so generously to Seniors on a Mission.*

#### Sustainability

*We strive for budgetary and operational sustainability using best practices in fundraising and financial management.*

### Tagline

*“Aging Purposefully”*

### Focus Groups

Focus group meetings will be/were held between May 1<sup>st</sup> and the July 11<sup>th</sup> Board meeting. Focus groups will react to the plan, offering suggestions, additions, and corrections set in the plan. Focus groups include/included but are not/were not limited to the May Board meeting, meeting(s) with engaged seniors, and with other interested stakeholders. These changes will be/were incorporated prior to the formal adoption of the strategic plan and implementation timeline. Focus group meetings may continue following the formal adoption of the plan over the next several years as new opportunities arise and challenges present themselves. This is to remain a living document that assists Seniors on a Mission with moving forward with confidence and great resolve.

### Monitoring the Plan

It will be the responsibility of the Seniors on a Mission staff and the Board of Directors to monitor progress toward the strategic plan. Board meetings and the annual review become opportunities for regular updates by Seniors on a Mission leadership and external consultants. Progress toward completion of each objective should be compared to the Annual Timeline and the Implementation Timeline to determine if the strategic plan should be amended, accelerated, or refocused. By placing one of three indicators next to each objective, Seniors on a Mission leadership and Board members can effectively monitor progress and make informed decisions.

Green = steady to significant progress being made

Yellow = some progress is being made but some adjustments may be necessary

Red = No progress is being made, this objective needs the attention of leadership

## **Elements of the Strategic Plan**

### **Goals**

Goals are the overarching themes of the work to be done by the organization for the next three years. As a result of the initial meetings, three distinct themes emerged as the goals for Seniors on a Mission.

### **Objectives**

Objectives describe the specific projects to be accomplished over the next three years. These objectives are in support of the overarching goals.

### **Task**

Task encompass the elements of the action plan that outlines the process and requisite work needed to achieve the objectives in support of the three goals. The tactics become the basis of work for the next three years and become a major focus for Seniors on a Mission.

### **Metrics**

Metrics provide information as to how we know that the objectives and tasks have been completed successfully. Metrics provide direction for staff to guide their work and assurances to stakeholders and donors that work is completed in accordance with the strategic plan.

### **Obstacles**

Factors that may inhibit the successful completion of the objectives such as lack of available resources, inadequate staffing or expertise, changing market trends, and lack of staff and Board buy in are identified to guide Seniors on a Mission staff toward successful outcomes.

### **Time Period**

To implement the strategic plan effectively, objectives need to be prioritized considering market trends, staffing expertise, and having the requisite resources. To plan the work, a time range is determined for each objective.

### **Project Lead**

It is important to identify the person responsible for organizing and implementing the objective(s) to ensure accountability and steady progress.

## Goals, Objectives, and Actions

The following initiatives represent the specific objectives for the next three years and form the basis of the strategic plan and implementation process.

### Goal 1: Create Greater Awareness of Seniors on a Mission

Objective 1.1: Create a comprehensive marketing plan for greater public awareness about seniors and their lives of purpose

Task 1.1a: Identify the target audiences, types of stories, and forms of media to reach targeted audiences

Task 1.1b: Create process for collecting information and stories and determine how to share that information effectively

Task 1.1c: Develop materials and disseminate in appropriate fashion

Task 1.1d: Continually measure effectiveness of the communication plan through analytics and stakeholder surveys

Objective 1.2: Find other community partners to share in the media blitz

Task 1.2a: Find related organizations and volunteer groups to help spread the word

Task 1.2b: Enlist local, statewide, and national media to share stories and information

Task 1.2c: Create avenues to connect and share information with local and state legislators

Objective 1.3: Increase the reach and number of people in the Seniors on a Mission database

Task 1.3a: Obtain a secure database system

Task 1.3b: Develop database system protocols

Task 1.3c: Perform regular cleaning and address update functions

Task 1.3d: Host meaningful events to expand the sphere of people connect to Seniors on a Mission

### Goal 2: Create a Sustainable Future for Seniors on a Mission

Objective 2.1: Survive as a nonprofit organization

Task 2.1a: Remain in compliance with regards to state rules, regulations, and reporting requirements

Task 2.1b: Provide accurate and timely financial reports

Task 2.1c: Establish fund endowments, investment strategies, fund management policies, and reporting guidelines

Objective 2.2: Develop multiple revenue streams for financial stability

Task 2.2a: Create operational revenue whenever possible through sales, admission, etc.

Task 2.2b: Develop a financial model for senior residential housing that helps seniors and provides additional funding for programs

Objective 2.3: Create a comprehensive fundraising effort on behalf of Seniors on a Mission

Task 2.3a: Develop an annual fund process that encourages repeatable funds, uncovers areas of interest or passion, and identifies wealth

Task 2.3b: Create a sponsorship strategy that moves sponsors into steady or increased levels of sponsorship

Task 2.3c: Design case statements, donor proposals, wealth screenings, and cultivation strategies for major gift prospects



- Task 2.3d: Host planned giving workshops to encourage estate giving to Seniors on a Mission
- Task 2.3e: Research, write, and report on private foundation and government grants for funding to launch programs
- Task 2.3f: Create a comprehensive stewardship program to thank donors, manage giving societies, and encourage future giving

Objective 2.4: Create new organizational structure to handle increased and anticipated amount of work

- Task 2.4a: Secure necessary equipment and tools to perform work
- Task 2.4b: Examine and follow state nonprofit rules and regulations
- Task 2.4c: Revise Seniors on a Mission By-Laws as necessary
- Task 2.4d: Find other partners to create efficiencies, fill skill gaps, etc.

Objective 2.5 Expand staff to handle increased numbers of seniors engaged and nonprofits served by Seniors on a Mission

- Task 2.5a: Perform internal skill assessment related to future initiatives (Ripple Effect exercise)
- Task 2.5b: Create job descriptions, initiate searches, develop partners
- Task 2.5c: Create regular training and offer professional development activities to staff, Board members, and volunteers

Goal 3: Increase the Number of Seniors and Nonprofits served

Objective 3.1: Expansion of current programs and numbers of seniors to assist worthy nonprofits

- Task 3.1a: Create a larger sphere of partners for seniors and the nonprofits they assist in Northeast Florida and beyond
- Task 3.1b: Develop a plan for expansion to other areas in Florida and across the U.S.

Objective 3.2: Create the first senior housing center facility partnership

- Task 3.2a: Research and develop plans for a senior housing development in Jacksonville
- Task 3.2b: Develop a plan for expansion of other senior housing centers across Florida and the U.S.

## **Ripple Effect Exercise**

The Ripple Effect exercise enables organizations to anticipate the effect that new initiatives have on existing operations and on the people that work for the nonprofit. Given the premise that staff members working for organizations are already working at capacity or close to capacity, a closer look at whether the nonprofit needs additional people or resources to complete and sustain the new initiative. The leadership team should discuss as to whether the current work is strategic or might be eliminated or at least postponed for a period of time. Organizations are typically better at adding new work than eliminating elements, so this exercise is particularly important to ensure effective implementation and sustainability of new initiatives.

When examining a new initiative, it is helpful to anticipate whether existing staff can cover the new responsibilities, whether the organization may need to hire new staff, or in some cases, whether partnering with other organizations is an option. These partnerships can provide potential solutions in several ways. First, organizations currently may not have the expertise to implement the new initiative so they either need

to train existing staff (often cost and time prohibitive), hire new staff (may also prove to be too costly), or partner with another nonprofit and share the expertise. Second, new initiatives may need support from other areas of the organization regarding staff time or resources to implement the project. Unfortunately, staff may already be committed to other work that prohibits them from completing the new tasks. Solutions may include a reprioritization of existing responsibilities, eliminating some non-essential or non-strategic tasks, or partnering with other organizations to create cost efficiencies and share expertise. Finally, partnering may have the net effect of positively affecting the host organization with the influx of support staff expertise that the host organization may not presently have.

The Ripple Effect exercise allows the organization to anticipate these issues and plan accordingly. The diagrams on the ensuing pages outline the new initiatives and the Ripple Effect they would have on the organization. The key defines the type of assistance needed for successful implementation.

### **Ripple Effect Key**



**Budgetary support needed**

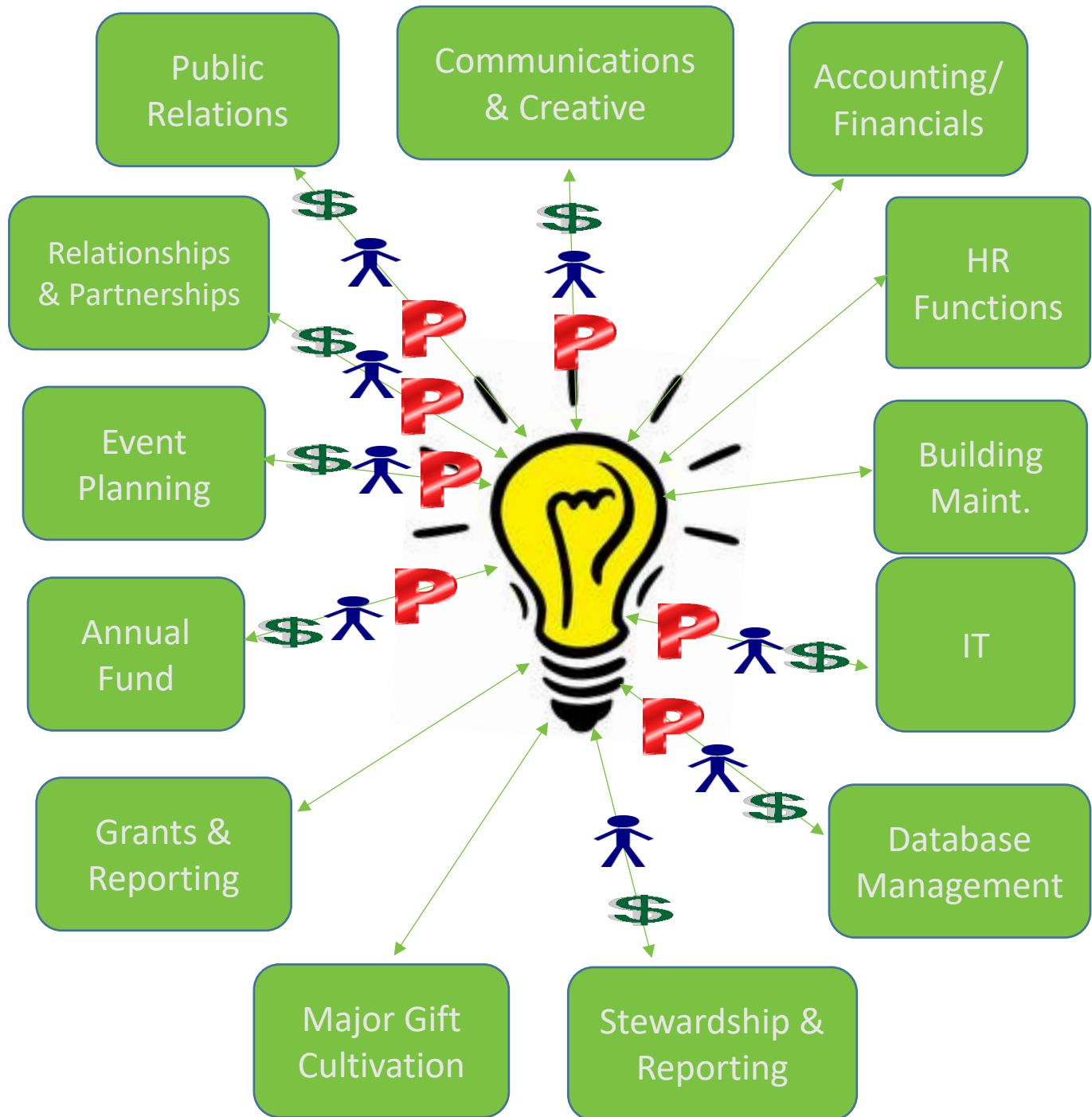


**Staffing needed**

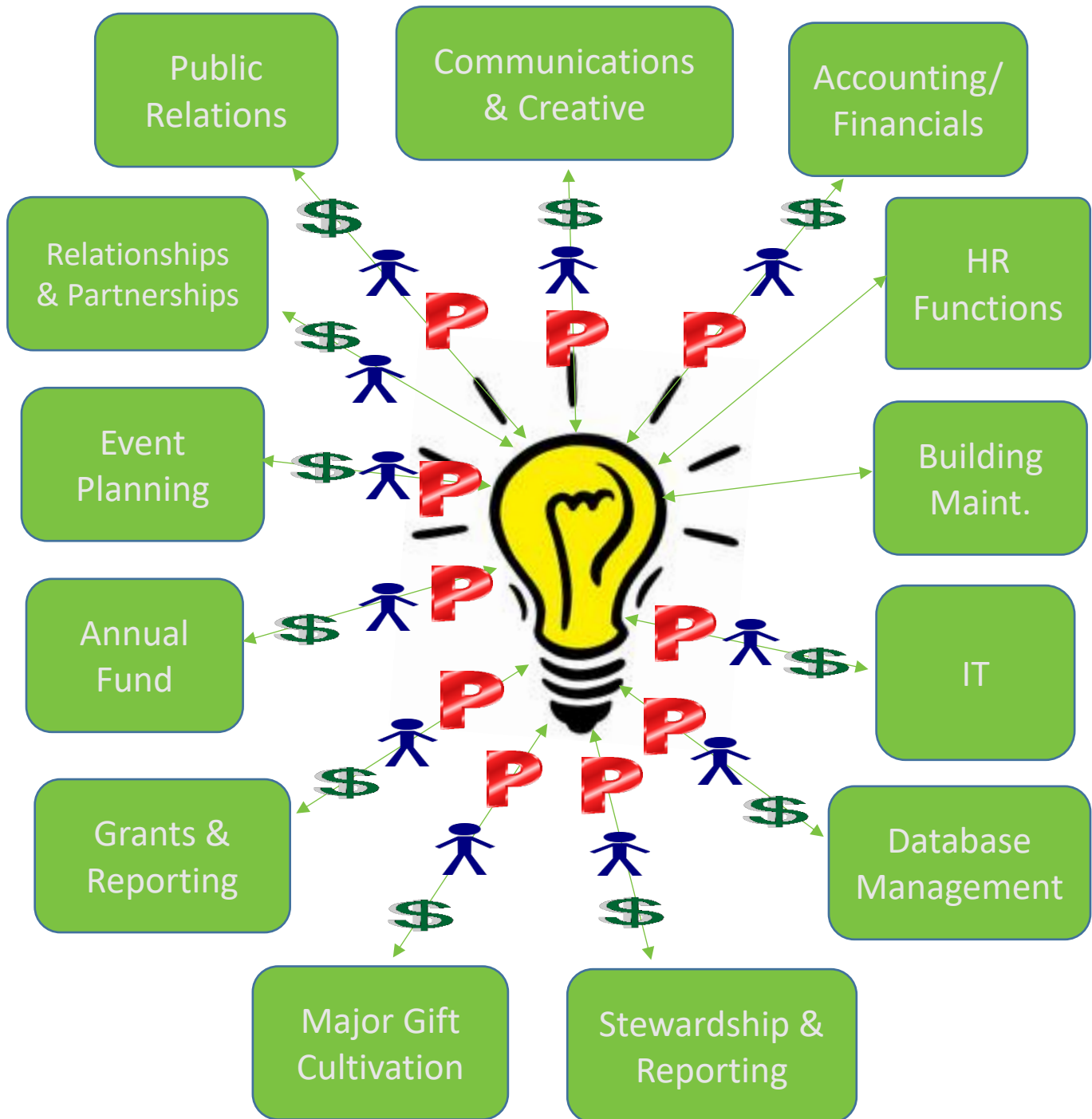


**Possible Partner opportunities**

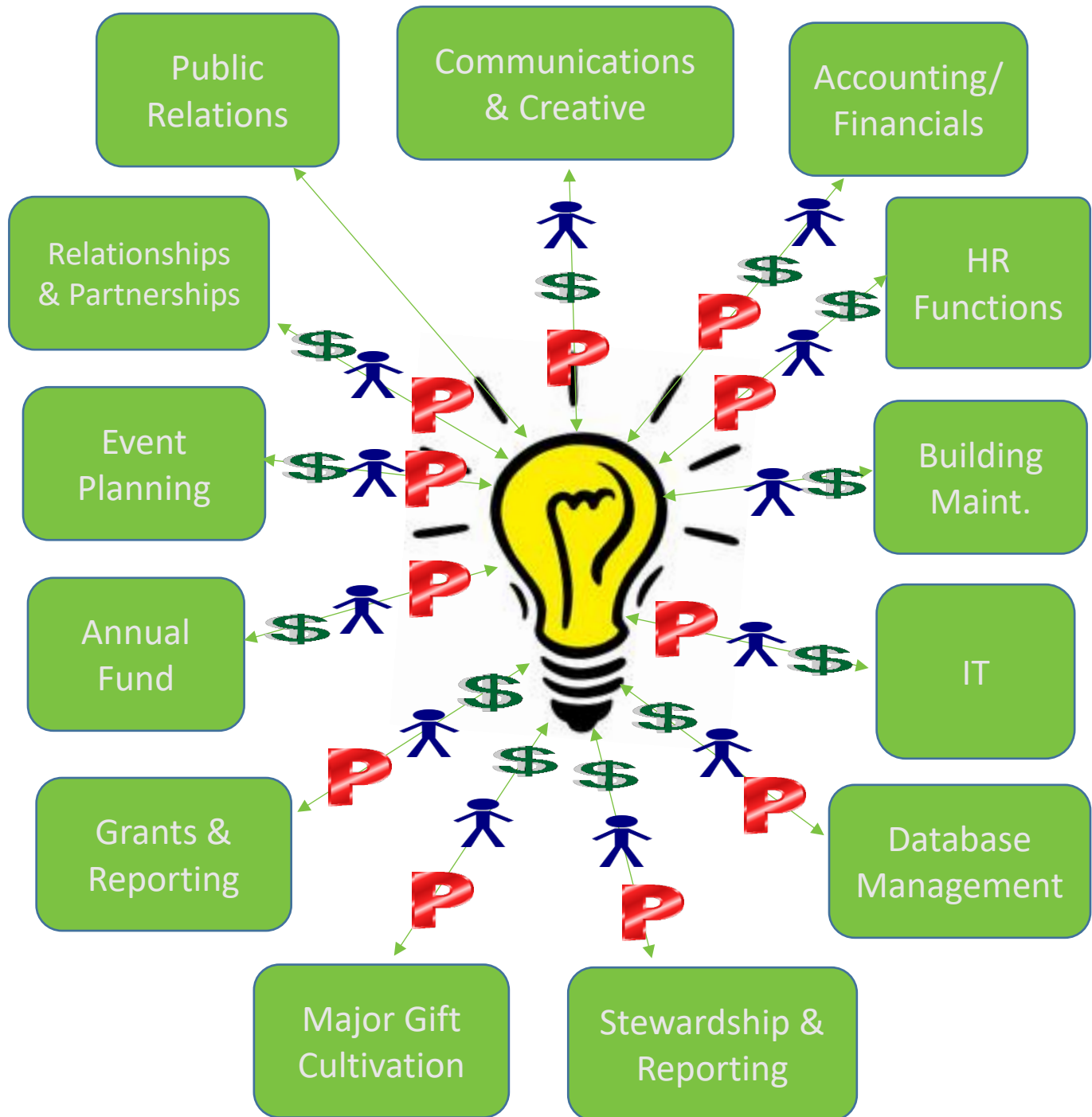
## Create Greater Awareness



## Create a Sustainable Future



## Increase the Numbers of Seniors & Nonprofits Served



## Strategic Plan Outline

Goals	Objectives	Tactics	Metrics	Obstacles	Time Period	Project Lead
<b>Goal 1:</b> Create Greater Awareness of Seniors on a Mission	1.1 Create a comprehensive marketing plan for greater public awareness about seniors and their lives of purpose	1.1a: Identify the target audiences, types of stories, and forms of media to reach targeted audiences	Survey metrics and analytics	Cost, lack of skill sets, etc.	8/1/19 to 12/31/19	External Consultant, Executive Director
		1.1b: Create process for collecting information and stories and determine how to share that information effectively	Number of stories, story matrix measures	Staff to collect meaningful stories	8/1/19 to ongoing	External Consultant, SoaM Team
		1.1c: Develop materials and disseminate in appropriate fashion	Surveys, gift increases, numbers of volunteers	Cost, time, staff	8/1/19 to 7/1/20	Executive Director, External Consultant
		1.1d: Continually measure effectiveness of the comm. plan through analytics and stakeholder surveys	Surveys, analytics	Cost, time, staff	8/1/19 to ongoing	Executive Director, External Consultant
	1.2: Find other community partners to share in the media blitz	1.2a: Find related organizations and volunteer groups to help spread the word	Finding quality organizations with similar values	Finding similar values that want to collaborate	10/1/19 to ongoing	Executive Director, External Consultant

<u>Goals</u>	<u>Objectives</u>	<u>Tactics</u>	<u>Metrics</u>	<u>Obstacles</u>	<u>Time Period</u>	<u>Project Lead</u>
		1.2b: Enlist local, statewide, and national media to share stories and information	Number of quality posts	Creating awareness of SoaM	9/1/19 to ongoing	Executive Director, External Consultant, and Consortium
		1.2c: Create avenues to connect and share information with local and state legislators	Number of meaningful meetings	Creating awareness of SoaM impact	11/1/19 to ongoing	Executive Director, External Consultant
	1.3 Increase the reach and number of people in the Seniors on a Mission database	1.3a: Obtain a secure database system	Industry standards	Cost, training, familiarity with terms	9/1/19 to 12/31/19	Executive Director and External Consultant
		1.3b: Develop database system protocols	Accuracy of data, mailings, next steps, donor giving, etc.	Staffing, training	7/1/20 and ongoing	External Consultant, new hire
		1.3c: Perform regular cleaning and address update functions	Accuracy of data, mailings, donors giving	Staffing, training	9/1/20 and ongoing	New hire
		1.3d: Host meaningful events to expand the sphere of people connect to SoaM	Number of engaged participants	Cost, staffing, training	10/1/20 and ongoing	Executive Director, External Consultant

<u>Goals</u>	<u>Objectives</u>	<u>Tactics</u>	<u>Metrics</u>	<u>Obstacles</u>	<u>Time Period</u>	<u>Project Lead</u>
<b>Goal 2:</b> Create a Sustainable Future for SoaM	2.1: Survive as a nonprofit organization	2.1a: Remain in compliance rules, regs, and reporting	Nonprofit status	Documents, Board and staff training,	9/1/19 and ongoing	Executive Director, External Consultant
		2.1b: Provide accurate and timely financial reports	Accuracy of reports	Time as organization grows	7/1/19 to ongoing	Executive Director
		2.1c: Establish fund endowments, investment strategies, fund management policies, and reporting guidelines	Growth, projections, expenditures	Time as funding grows	7/1/19 and ongoing	Executive Director
	2.2: Develop multiple revenue streams for financial stability	2.2a: Create operational revenue whenever possible through sales, admission, etc.	Aggregate amount, sustainable projections	Staff, time, types of revenue streams	9/1/19 and ongoing	Executive Director, External Consultant
		2.2b: Develop a financial model for senior residential housing that helps seniors and provides additional funding for programs	Revenue numbers match growth objectives, sustainability	Funding, appropriate partner	7/1/19 and ongoing	Executive Director, External Consultant
	2.3: Create a comprehensive fundraising effort on behalf of Seniors on a Mission	2.3a: Develop an annual fund process that encourages repeatable funds, uncovers areas of interest or passion, and identifies wealth	Aggregate number of donors and \$, wealth screening results	Staff, training	3/1/21 and ongoing	External Consultant, new hire



<u>Goals</u>	<u>Objectives</u>	<u>Tactics</u>	<u>Metrics</u>	<u>Obstacles</u>	<u>Time Period</u>	<u>Project Lead</u>
		2.3b: Create a sponsorship strategy that moves sponsors into steady or increased levels of sponsorship	Number of sponsors, aggregate \$	Time, staffing`	1/1/20 and ongoing	External Consultant
		2.3c: Design case statements, donor proposals, wealth screenings, and cultivation strategies for major gift prospects	Completion of materials and effective use in cultivation visits, listening to prospective donors	Training	7/1/19 and ongoing and ongoing	Executive Director, External Consultant
		2.3d: Host planned giving workshops to encourage estate giving to SoaM	Attendance at panels, number of estate gifts	Trained estate professionals	7/1/20 and ongoing	Executive Director, External Consultant
		2.3e: Research, write, and report on private foundation and government grants for funding to launch programs	Number of foundations researched, applied, accepted	Trained staff, low percentage of accepted grants	7/1/20 and ongoing	External Consultant
		2.3f: Create a comprehensive stewardship program to thank donors, manage giving societies, and encourage future giving	Number of touches, accuracy, increases in year to year giving	Trained staff  Sustainable budget and trained staff	7/1/20 to 10/1/20 ongoing	External Consultant and new hire

<u>Goals</u>	<u>Objectives</u>	<u>Tactics</u>	<u>Metrics</u>	<u>Obstacles</u>	<u>Time Period</u>	<u>Project Lead</u>
	2.4: Create new organizational structure to handle increased and anticipated amount of work	2.4a: Secure necessary equipment and tools to perform work	Best practices	Staff, budget	9/1/19 to ongoing	Executive Director, External Consultant
		2.4b: Examine and follow state nonprofit rules and regulations	Compliance measures	Trained staff	9/1/19 to ongoing	Executive Director, External Consultant
		2.4c: Revise Seniors on a Mission By-Laws as necessary	Follow nonprofit State guidelines	Board motivation	9/1/19 and ongoing	Executive Director, External Consultant guidance
		2.4d: Find other partners to create efficiencies, fill skill gaps, etc.	Number of suitable partners, Number of areas covered	Lack of staff time, trained staff	9/1/19 to ongoing	Executive Director, External Consultant
	2.5: Expand staff to handle increased numbers of seniors engaged and nonprofits served by SoaM	2.5a: Perform internal skill assessment related to future initiatives (Ripple Effect exercise)	Work division and cost effective analysis.	Budget	5/1/20 and ongoing	Executive Director, External Consultant
		2.5b: Create job descriptions, initiate searches, develop partners	Job descriptions aligned with growth	Budget, expertise in designing job descriptions	1/1/20 and ongoing	Executive Director, External Consultant
		2.5c: Create training & professional dev. activities to staff, Board, volunteers etc.	Job growth and ROI as a result of SoaM development	Budget, patience	7/1/20 to ongoing	Executive Director, External Consultant

<u>Goals</u>	<u>Objectives</u>	<u>Tactics</u>	<u>Metrics</u>	<u>Obstacles</u>	<u>Time Period</u>	<u>Project Lead</u>
<b>Goal 3:</b> Increase the Number of Seniors and Nonprofits served	3.1: Expansion of current programs and numbers of seniors to assist worthy nonprofits	3.1a: Create a larger sphere of partners for seniors and the nonprofits they assist in Northeast FL and beyond	Partners who bring expertise, cost savings, etc.	Finding organizations with similar values	9/1/19 and ongoing	Executive Director and External Consultant
		3.1b: Develop a plan for expansion to other areas in Florida and across the U.S.	1 <sup>st</sup> program success ROI measurables for comparison	Completing 1 <sup>st</sup> project successfully, documentation	11/1/19 and ongoing	
	3.2: Create a senior housing center	3.2a: Research and develop plans for a senior housing development in Jacksonville	Work with skilled building planners to create a solid project management schedule	Completing 2 <sup>nd</sup> project successfully, documentation	1/1/19 and ongoing	
		3.2b: Develop a plan for expansion of other senior housing centers across Florida and U.S,	Documented implementation steps for 2 <sup>nd</sup> city development	Completion of initial project	11/1/19 and ongoing	

## **Budget Planning**

To ensure steady progress toward completion of the strategic plan, it is necessary to anticipate and calculate future expenses and revenues. In this model, revenues will be based on two areas – operational income and philanthropic support. Philanthropic figures will be based on the amount of time needed by Seniors on a Mission staff and/or the consultant and consultants’ team to achieve the projected fundraising figures through the implementation process beginning in July 2019. This effort consists of an advancement approach to fundraising that includes telling the story effectively, developing meaningful relationships, and securing significant resources. One of the first tactics includes an exercise with staff during Fall 2019 to determine budget income and expenses to achieve the goals of the strategic plan.

## **The Advancement (Fundraising) Plan**

A major portion of the initial and ongoing revenue will be generated through philanthropic efforts. The Advancement Plan is divided into three areas of work. The three areas are:

- Telling the Story
- Developing Meaningful Relationships
- Securing Significant Resources

It is important to keep all three areas moving and working together to accomplish a sustainable fundraising model for the organization. The following illuminates the work of the comprehensive advancement approach to fundraising on behalf of Seniors on a Mission.

## **Telling the Story**

### **Communications Strategies**

- Creating Communication Plans
  - Create a comprehensive communication plan to effectively “Tell the Story” in support of the organizational plan and revenue strategies
- Telling the Story effectively
  - Determine the who, what, when, where, and how strategies that link the organizational plan and revenue plans
- Website development
  - Maintain a dynamic website in support of the organizational and revenue plans
- Social media planning and design
  - Create virtual messages that reach the targeted audiences with impact
- Identify liked minded partners as part of this strategy

### **What stories should we tell?**

- Announcements
- Celebrations, achievements
- Donor stories
- Profiles
- How to...
- Seniors on a Mission services and materials
- Aging research, nonprofit research

To whom should we tell the stories (audience)?

- Current seniors and families
- Families served in the past
- Community
- Donors
- Businesses, corporations
- Private foundations
- Media outlets
- Professional organizations
- Local and state politicians/officials

What media should we use?

- Speaking to community groups
- Newspaper stories
- Advertisements
- Magazines, targeted journals
- Other Seniors on a Mission publications, annual report, etc.
- Newsletter – print and online
- Billboards, posters, placards, etc.
- Television, cable, radio
- Website
- Social media
- Videos
  - Educational Services
  - Videos of events
- Tchotchkes (Experiential Event giveaways)

When should we tell the story?

- Determine the timing of when the stories should be told
  - Pre
  - Post
  - Both

Creative Services

- Creative Design
  - Design images that capture the essence of Seniors on a Mission
    - Print and virtual design
    - Website development
    - Brand logo design
    - Annual Fund mailings
    - Event publicity
    - Campaign materials design
    - Press Releases
    - Writing
- Branding
  - Implement an effective brand strategy to ensure recognition and repeat business
- Emerging Stories Process
  - Develop a systematic and measurable process to find compelling stories about Seniors on a Mission

## Analytics and Metrics Development

- Create reports that reflect the organizational work and progress toward the goals
  - Board reports
  - Annual Reports to donors
  - Grant reports
  - Social media analytics
  - Tracking donor information and cultivation progress

## Developing Meaningful Relationships

### Recruiting volunteers in areas of strategic influence/skills/geography

- Find other liked minded organizations to share in telling the story
  - Share in telling the story and developing and distilling relationships
- Develop a Friends/Constituent Network
  - Help to effectively engage people and move them to greater involvement
- Create Relational Impact Events (Experiential Regional Events)
  - Design effective events
    - Tell the story
    - Engage the attendees at the event and in the future
    - Raise repeatable funds and inspire major gift donors
- Board Development and Training
  - Determine what is/should the role of the Board be to effectively fundraise
  - Board orientation and professional development in support of Seniors on a Mission
- Recruit Effective Board Members
  - Find Board members that can connect you to expertise, geographic locations, wealth, and more connections
- Engage Board Members
  - Utilize Board member time wisely and efficiently in support of Seniors on a Mission
- Establish Board Member Roles
  - Identify and create meaningful Board member roles and expectations

### Strategic events

- Effective relational development is dependent on offering quality events
- Events need to:
  - Be of the highest quality
  - Provide access to activities that prospective donors might not normally have access to
  - Be fun
  - Offer opportunities to tell the Seniors on a Mission story
- List of potential events
  - Experiential
  - Fundraising/Friendraising Events
  - Media event
  - Planned Giving Seminars
  - Others

## Securing Significant Resources

### Resource development

- Organizational Income
  - Create an effective business plan for the operational side of Seniors on a Mission
- Fundraising
  - Develop a fundraising strategy that raises significant funds for today and for tomorrow

### Fundraising materials

- Proposal development, writing, and presentation design
  - Help create inspiring prospective business and donor proposals

### Annual Fund

- Implement a strategy to increase annual repeatable funds
  - Encourage regular giving to generate yearly source of funds
  - Identify areas of interest or passion in our donors
  - Uncover donors of significant wealth
- Phonathon/Thank youthon
  - Help staff and volunteers with calling donors and prospective donors
  - Say thank you
  - Develop effective scripts to engage and inspire donors to give
- Fundraising events
  - Design effective fundraising events that connect Seniors on a Mission to the right donors
  - Find unique events that align with the organizational focus
  - Perform high quality events that represent the mission and vision
- Area specific fundraising planning
  - Create segmented fundraising plans
    - Uncover areas of interest and passion in donors
    - Plan a comprehensive strategy to obtain funds for the strategic plan priorities
- Sponsors and Corporate support
  - Create a regular sponsor engagement strategy
  - Find solutions that benefit the businesses and Seniors on a Mission
  - Secure annual giving commitments that grow over time
  - Steward supporters effectively

### Major Gifts

- Raise significant funds from top donors
  - Create powerful donor proposals
  - Determine the right time to “Ask”
  - Assist with the in person “Ask”
  - Create a follow up strategy
  - Steward the donor effectively to inspire future gifts

### Planned Giving

- Help donors find lifetime giving solutions
- Engage “Trusted Advisors” to encourage lifetime gifts
- Host planned giving seminars to assist donors with their estate planning and stimulating future giving possibilities

#### Grant writing

- Connect grants to the strategic plan and resource development
- Private Foundations Grants
- Government Grants (Only with Executive Director & Board Approval)

#### Stewardship/Donor Relations

- Recognition strategies
  - Thank the donors seven ways
- Develop giving societies
  - Move donors forward to higher levels of giving

#### Database Management

- Keep the database current and accurate
- Wealth Screening
  - Locate donors of significant wealth
  - Tailor donor proposals with donor profile research

#### Capital Campaigns

- Readiness Studies
  - Determine if the Board and the Seniors on a Mission Team are ready for a campaign
- Feasibility Studies
  - Determine if the donor pool wealth matches the goals for the campaign
- Campaign Case Statement Development
  - Develop inspiring campaign fundraising pieces to inspire donors
- Campaign Event Planning
  - Create meaningful events that encourage giving and identify major gift prospects
- Major Gift Cultivation
  - Help with all aspects of donor cultivation in the Campaign
    - Prepare for the “ask”
    - Develop donor proposals
    - Make the “ask”
    - Donor follow up
    - Stewardship of major gift donors

#### **Proposed Partners (Consortium)**

The Proposed Partners list should reflect organizations of similar or related purpose and function. Potential partners will be first discussed beginning in July 2019 and continue until a consortium is formed for maximum exposure and ultimately to help greater numbers of seniors, their families, and nonprofit organizations served. The goal of the consortium is three-part. First, the Consortium will expand the reach of all groups together. Second, by sharing compelling stories and information, more constituents and their families can be served. Finally, because identification to specific causes and organizations will surface, increased fundraising numbers for all members of the Consortium will result from these collaborative partnerships.



## **The Annual Timeline**

The annual timeline is a roadmap that outlines the work each month in the three advancement areas to move Seniors on a Mission toward completion of the strategic plan. This work includes increased exposure and awareness about Seniors on a Mission; an expanded reach of the organization through meaningful relationships, and greater fundraising results. The Seniors on a Mission annual timeline outlined on the following pages provide the framework to develop an annual plan to guide leadership, the Board of Directors, and external consultant team. The goal of this annual strategic approach is to move Seniors on a Mission forward in anticipation of the retirement facility, new program development, increased volunteerism, a supportive infrastructure, and a sustainable funding model. Following the timeline milestones will provide the necessary funds to cover external consultant costs who will provide the needed expertise to complete the strategic plan in the next three years.

		Seniors				
		January	February	March	April	May
C O M M U N I C A T I O N S	Monthly ENotes - Major Headings					
	Social Media Posts, Website Updates	Facebook posting of Mission Trips	Facebook posting of Mission Trips	Facebook posting of Mission Trips - UNF Intern update webpage	Facebook posting of Mission Trips	Facebook posting of Mission Trips
	Press Releases & Broadcast Media			First Coast Living TV	FM 94.7 with Angela Apears	
	Print Mailings & Postage	Monthly Newsletter to Seniors	Monthly Newsletter to Seniors	Monthly Newsletter to Seniors	Monthly Newsletter to Seniors - Save the Date (for fundraiser)	Monthly Newsletter to Seniors
	Virtual Advertisements					
	Print Advertisements					
R E L A T I O N S H I P S	Board/Committee Meetings	Board Meeting	Action Council Meeting	Board Meeting	Action Council Meeting - Prep 990	Board Meeting
	Community Events			Senior Thank You Luncheon	Comcast Cares Day	
	Experiential Events					
	HR & Other Annual Functions					

## on a Mission

June	July	August	September	October	November	December
Facebook posting of Mission Trips	Facebook posting of Mission Trips	Facebook posting of Mission Trips	Facebook posting of Mission Trips	Facebook posting of Mission Trips	Facebook posting of Mission Trips	Facebook posting of Mission Trips
Monthly Newsletter to Seniors	Monthly Newsletter to Seniors	Monthly Newsletter to Seniors	Monthly Newsletter to Seniors	Monthly Newsletter to Seniors and Donors	Monthly Newsletter to Seniors and Donors	Monthly Newsletter to Seniors and Donors
Action Council Meeting	Board Meeting	Action Council Meeting	Board Meeting	Action Council Meeting - Prep Budget for upcoming year	Board Meeting	Action Council Meeting

## Seniors

		January	February	March	April	May
R E S O U R C E  D E V E L O P M E N T	Operational Revenue					
	Annual Fund & Fundraising Events					
	Corporate Sponsors				Look for Ambassador Event	
	Major & Planned Gifts					
	Foundation & Government Grants		Jim Moran Fdn. Awarded			
	Stewardship Functions					
	Other/Notes					

on a Mission

June	July	August	September	October	November	December
				Ambassador Dinner Fundraiser		

## Seniors on a Mission Implementation Timeline

### Phase I Strategic Plan Facilitation

Month 1-2 (February-March 2019)

1. Strategic Planning and Implementation Retreat/Exercise – **External Consultant (funded by Seniors on a Mission Operating Budget) \$2,500**

- Workshop format to uncover vision, goals, and objectives
- Evaluate revenue generation and fundraising readiness
- Board approval for next steps

### Phase II Strategic Plan Development

Months 3-5 (April-June 2019)

2. Creation of Formal Plan and Implementation Research – **External Consultant (funded by Seniors on a Mission Operating Budget) \$0**

- Create plan for Seniors on a Mission or Consortium to fund first three areas of work – Marketing & Communications, IT, and Events Coordinator
- Determine cost for each step
- Develop proposals for marketing & communications launch
- Secure % of total cost from each Consortium members to fund comprehensive launch OR
- Secure private donations to fund SoaM privately OR
- Operating Budget expense

**If participating by Consortiums funding is not available or not yet available...**

Months 6-9 (July-October 2019/ongoing)

3. a. Preliminary Sponsor/Major Gift work (as necessary) **\$TBD a month - External Consultant**

- Wealth screening of existing database (cost)
- Develop a Communication and Marketing Proposal
- Develop Senior Housing Facility Proposal
- Proposal development or one cultivation prep and visit a week
- Travel included except when out of region (overnight)
- Remain in this mode until Marketing and Communication, IT, and PT Events Coordinator is funded for one year
- Option to remain in this major gift mode until funding for Senior Housing is secured

### Phase III Implementation Strategy begins

Months 10-ongoing (November-ongoing)

4. Marketing & Communications (**percentage from each Consortium member OR major gift donations revenue offset**) – **External Consultant/External Marketing Agency \$TBD a month**

- Goal – increasing the number of names, addresses, emails, and social media contacts of people knowing about and interested in the Consortium cause, periodic general or soft appeal

- Overall work
  - Individual Consortium work (targeted messages)
  - Cause Marketing across Consortiums (awareness pieces, events, etc.)
  - General or soft appeals as part of communication plan
- Communications
  - Collecting stories
    - Interviewing
    - Video
    - Collection of data
    - Research
    - Writing stories
      - Announcements, celebrations, achievements
      - Historical pieces
      - Research findings
      - Future initiatives
      - Profiles – staff, alumni, donors, recipients, Board members, volunteers
      - Donor stories
      - How to...
      - Annual Report
  - Audiences
    - Internal communications
    - Participants
    - Current participant families
    - Prospective families/groups
    - Community
    - Businesses, corporations
    - Donors
    - Private Foundations
    - Local and State legislators/policymakers
    - Professional organizations
    - Strategic partners
  - Media
    - People to people (armed with elevator pitch)
      - Individual
      - Speaking engagements
    - Print
      - Press releases (print and virtual), newspapers
      - Advertisements
      - Magazine articles, targeted journals
      - Newsletter and Enewsletter (virtual)
      - Billboards, posters, placards, etc.
    - Broadcast and Virtual
      - Television, cable
      - Radio
      - Website
      - Social media
        - Enewsletters – to reach established audiences
        - Face Book – expanding networks, older demographics, FB ads

- YouTube – performances/activities, profiles, testimonials, (variety of formats)
    - Instagram – photos & videos, <35 demographics, hashtags to boost viewers
    - Twitter – messages, use of hashtags, no max on posts
    - Snapchat – multimedia messages, millennials, another way to share
    - LinkedIn – reaching professional networks
  - Timing or releases
    - Pre
    - Live
    - Post
    - Both
  - Writing/editing
    - Social
    - Print pieces (more formal)
  - Graphic design
    - Formal
    - Virtual
  - Press releases
  - Placement in professional journals, related publications, social calendars
  - Social media
  - Website
  - Commercials
- Marketing/placement
  - Advertising events
  - Placing strategic ads
  - Journals, publications, etc.
  - Billboards
  - Commercials
  - Analytics
    - Quarterly reports
    - Yearly report with next year recommendations
    - Effect on attendance, revenue generation
- Connect recipient information and creative materials to database
- Create general and soft appeals as part of communication plan **(with assistance from External Consultant)**

Months 10-ongoing (November-ongoing)

5. IT – External Consultant/External (local) IT Solutions Company **(percentage from each Consortium member OR major gift donations pool) paid directly to IT Company, \$0 to External Consultant**

- Goal – provide a secure repository for names and demographic information, wealth screening, next steps, marketing & communication information, events, etc.
- Secure data storage space (server) and back up
- Website development and maintenance
- App integration
- Operational service functions



Months 10-ongoing (November-ongoing)

**6. Events Coordinator – external local Event Planner (from each Consortium member OR major gift donations pool – paid directly to external vendor) \$TBD (1x) to External Consultant for both Events and Stewardship hiring and coaching**

- Goal – gather more individual names and demographic information, branding, awareness, fundraisers through relational events
- External Consultant will assist with hiring and training
  - Each Consortium organization could decide to have their own PT event coordinator
  - External Consultant would train group on goal achievement
- Focus of work
  - Individual Consortium awareness/fundraising events
  - AND/OR entire Consortium awareness/fundraising events
- Awareness events
- Fundraising events
- Data placed into database and corresponding analytics
- Feeds communication and marketing with images, videos, interviews, etc.

Month 12-ongoing (January 2020-ongoing)

**7. Stewardship Manager – first Seniors on a Mission PT or full-time hire (funded by individual Consortiums for their respective organizations) \$5,000 (1x) to External Consultant for both Events and Stewardship hiring and coaching**

- Goal – thank donors and sponsors, recognition, encourage future giving
- External Consultant assists Consortium organizations with format and process for hiring and creating
  - Job description
  - Interview process
  - Hiring process
- Mentor new hire
- Training attributes
  - Receipt letters
  - Thank you letters (as part of 7 Ways to Thank Donors)
  - Manage database information
  - Establish and update recognition societies and processes
  - Manage Next Steps
  - Organize Planned Giving Seminars

Month 13-ongoing (February 2020-ongoing)

**8. Experiential Events (funded by general and soft appeals & combined Consortium Fundraising Events) \$TBD to External Consultant/external agency, \$3,000 + cost of tchotchkes per event**

- Goal – gather significant numbers of new contacts secure additional names and demographic information for database, create awareness for Consortium cause
- Locate appropriate functions to connect with
- Event logistics, staffing
- Table/booth giveaways
- Registration data transfer to database
- Smaller Experiential events can be done by Event Coordinator and Stewardship Director as needed

Months 13-ongoing (February 2020-ongoing)

9. Grant Writing – External Consultant External expertise **(funded by % from each Consortium Organization OR by individual Consortium Organizations) \$TBD a month to External Consultant for research and writing**

- Goal – develop seed funds for various vision projects
- Research
- Writing
- Submissions and tracking of prospective foundations
- Disbursement of funds and reporting

Months 13-16 (February-May 2020)

10. Major Gift Fundraising – External Consultant **(funded by each Consortium Organization) \$TBD a month to External Consultant**

- Goal – raise funds in support of overarching and individual Consortium vision from sponsors and entry level gifts from prospective major gift donors for individual Consortia, train internal staff,
- Organize wealth screening (off-site professionals)
- Identify major gift prospects
- Identify prospective sponsors and major gift prospects for seed funding
- Work with each Consortium to develop proposals
- Spend designated period of time visiting sponsors and donors with Head of Consortium
- Identify prospective sponsors and major gift prospects for through wealth screening and descriptions
- Provide guidance for Head of individual Consortia about major gift fundraising best practices
- Spend designated period of time visiting sponsors and donors with head of Consortium

Months 17-ongoing (June 2020-ongoing)

11. Sponsor and Major Gift Officer – External Consultant Training with second internal hire **(funded by individual organizations) \$TBD a month to External Consultant until transition is completed**

- Goal – develop an internal development officer for each Consortium Organization to raise significant funds
- Help create job description for internal hire as part of nonprofit staff
- Assist with hiring process
- Mentor and train new hire in the field

Month 20-ongoing (September 2020-ongoing)

12. Annual Fund Director – External Vendor **(funded by Annual Fund returns & fundraising events)**

- Goal – assists individual Consortium Organizations and entire network with securing repeatable funds, finding areas of interest, locating wealth
- Advertise position and job description (with External Consultant assistance)
- Hire external agency/External Consultant
- External Consultant works with Agency on behalf of all Consortium organizations
- Feeds organization with future major gift prospects into their pipeline

Month 22-ongoing (November 2020-ongoing)

**13. Accounting/Payroll/Taxes/Compliance (funded by % from each Consortium Organization or SoaM)**

- Goal – provide consistency in all financial record processes, certifications, compliance
- Bookkeeping across all Consortiums for individual organizations for consistency, Consortium nuances, etc.

Month 24-ongoing

**14. HR Management – External expertise (funded by % from each Consortium Organization or SoaM)**

- Goal – provide external expertise to guide the operational path and development of staff, create greater consistency and Consortium nuances
- Payroll
- Benefits
- Training
- Evaluation
- Hiring
- Motivational aspects
- Succession planning